WELFARE DATA TRACKING IMPLEMENTATION PROJECT
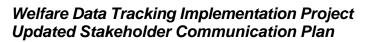
UPDATED STAKEHOLDER COMMUNICATION PLAN

1. Project Overview

1.1 Document Purpose

The purpose of the Welfare Data Tracking Implementation Project (WDTIP) **Updated Stakeholder Communication Plan** deliverable is to document the formal communication program developed for the WDTIP Project. The communication plan was developed to ensure that WDTIP stakeholders and team members are informed about the WDTIP change imperative, WDTIP status and development, implementation and conversion efforts.

1.2 Project Overview

This section provides an overview of the WDTIP, delineating project definition, purpose, objectives and scope to provide the reader with the context for decisions made regarding the system and user acceptance testing planning and associated activities.

1.2.1 Project Definition

The WDTIP is a system development project that includes overall project management; designing, building and testing the system; developing and executing user training; communicating with internal and external stakeholders; and deploying the system. In addition, data will be converted from county systems to the WDTIP database. It is anticipated that this data conversion will entail both automated and manual methods. Subsequent ongoing batch data loads from the counties are also included in the WDTIP. WDTIP scope is detailed in the *1.2.2 Project Scope* subsection below.

In response to the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996, the State of California passed Assembly Bill (AB) 1542. AB-1542 institutes the Temporary Assistance to Needy Families (TANF) program in California and imposes welfare time limits, as well as new programmatic and eligibility rules. In addition to welfare time limits, AB-1542 mandates work requirements through the California Work Opportunity and Responsibility to Kids (CalWORKs) program. As a result of the CalWORKs program, county welfare departments are required to have a mechanism to track eligibility time limits, and other related data on an individual level, across counties and over time to comply with the tracking requirements of both State and Federal mandates.

The purpose of the WDTIP is to provide a communication mechanism and central data repository that can be accessed by all technology-enabled counties and relevant agency systems to meet the requirements of TANF and CalWORKs legislation. WDTIP addresses the immediate need for Federal and State Welfare Reform tracking functions imposed by the Federal PRWORA, AB-1542 and relevant All County Letters (ACLs) issued by the California Department of Social Services (CDSS).

The WDTIP objectives are to satisfy the aforementioned legislative requirements by providing an automated statewide repository for Welfare Reform data elements and to facilitate communication between disparate county welfare and statewide welfare-related

systems. The primary data to be collected, calculated (if necessary), and tracked for applicants/recipients includes:

❑ TANF 60-month clock

❑ CalWORKs 60-month clock

❑ Welfare to Work (WTW)18/24-month clock

1.2.2 Project Scope

The overall objective of the WDTIP is to provide a communication mechanism and central data repository that can be accessed by all technology-enabled counties and relevant agency systems. In addition, the WDTIP system must enable counties to meet the requirements of Welfare Reform. The scope of the WDTIP includes design, construction, testing and implementation of the WDTIP system. This system will enable all 58 California counties to accurately track individual welfare recipient information to meet the requirements of both State and Federal Welfare Reform. WDTIP is also tasked with development of Customer Information Control System (CICS) screens that will provide counties with the ability to view data, perform inquiry and online updates and create management reports.

In addition to the WDTIP system development tasks listed above, the WDTIP is responsible for conducting a one-time data conversion of county data. This one-time conversion will be required for the initial county data load into the WDTIP database. The counties will perform subsequent ongoing data loads. Examples of data to be tracked in the WDTIP system include:

❑ PRWORA time clock calculation

❑ CalWORKs time clock calculations, including exceptions and exemptions

❑ Diversion program and payment information

❑ Sanction information to provide appropriate CalWORKs sanction data across counties

The data conversion of county data to populate the WDTIP database will be a vital component of the WDTIP. Some counties have not maintained the level of historical data necessary to provide the initial county-specific information required for optimal time clock calculations. In addition to this, because the Medi-Cal Eligibility Data System (MEDS) does not supply all the needed data, SAWS Information System (SIS) cannot currently provide complete data tracking or correctly calculate cumulative time-on-aid. To calculate accurate time-clock data, the WDTIP database must be populated with direct county data via a one-time data conversion and ongoing updates.

The WDTIP Implementation and WDTIP Application Teams (with input from the counties) developed conversion specifications and standard file formats that will support each county's conversion and update efforts. Each county will now be responsible for providing the conversion data files to populate the WDTIP database. It is expected that counties or their consortium will provide WDTIP with ongoing data files. County

technical resources will be needed to produce the conversion extract. It is important that all counties participate in this conversion effort for the WDTIP system to generate complete, accurate and meaningful data.

It is expected that the quality of the county data and the resulting time clock calculation will improve as counties begin using the WDTIP system to collect and maintain the required time tracking data elements. The scope of WDTIP includes assisting the counties with the following data conversion activities: design, development, testing and implementation of conversion programs including, but not limited to, the following:

❑ Identification of required county data elements to populate the WDTIP database

❑ Identification of county file format requirements

❑ Development of edit and error processing rules

❑ Development of ongoing load requirements for county data into the WDTIP database

❑ Assistance with the one-time initial data conversion

❑ Assistance for the county technical resources when developing the data extract requirements

In addition, the WDTIP is responsible for the following implementation activities:

❑ Regional information sessions

❑ Regional training sessions

❑ County visits as needed

❑ Consistent communication with stakeholders

❑ Implementation support

The scope of the WDTIP does not include:

❑ Providing counties with resources to convert county data into the standard file (for initial data conversion and ongoing data loads)

❑ Assisting agencies/counties with the design and development of county-specific welfare screens to view WDTIP data

❑ Developing or managing changes to the Statewide Client Index (SCI) application

2. Acronyms

The table below provides a list of commonly used acronyms within this document.

Table 2-1: Acronyms

Acronym	Phrase/Name
AB	Assembly Bill
ACIN	All County Information Notice
ACL	All County Letter
CACDP	California Association of County Data Processors
CALWIN	CalWORKs Information Network
CAT	County Advisory Team
CalWORKs	California Work Opportunity and Responsibility to Kids
CAWSAC	California Automated Welfare Systems Advisory Committee
CCSAS	California Child Support Automation Systems
CDHS	California Department of Health Services
CDSS	California Department of Social Services
CICS	Customer Information Control System
C-IV	Consortium IV
CMAG	California Medi-Cal Advisory Group
CWDA	California Welfare Directors Association
CWS/CMS	Child Welfare System Case Management System
DGS	Department of General Services
DOF	Department of Finance
DOIT	Department of Information Technology
EBT	Electronic Benefit Transfer Project
EDG	External Developer's Guide
GAIN	Greater Avenues for Independence
GEARS	GAIN Employment Activity and Reporting System
GEMS	GAIN Employment Management System

Acronym	Phrase/Name
GIS	GAIN Information System
HCFA	Health Care Financing Administration
HHSDC	California Health and Human Services Agency Data Center
ISAWS	Interim Statewide Automated Welfare System
IT	Information Technology
IV&V	Independent Verification and Validation
JAD	Joint Application Design
JRP	Joint Requirements Planning
LEADER	Los Angeles Eligibility, Automated Determination, Evaluation and Reporting System
MEDS	Medi-Cal Eligibility Data System
PRISM	Child Support Pre-Statewide Interim Systems Management
PRWORA	Personal Responsibility and Work Opportunity Reconciliation Act
PTS	Project Tracking System
SAWS	Statewide Automated Welfare System
SCI	Statewide Client Index
SFIS	Statewide Fingerprint Imaging System
SIS	SAWS Information System
TANF	Temporary Assistance for Needy Families
TRT	Technical Review Team
USDA	United States Department of Agriculture – Food and Nutrition Service
WCDS	Welfare Case Data System
WDTIP	Welfare Data Tracking Implementation Project
WTW	Welfare to Work

3. Overview

3.1 Document Purpose

The Health and Human Services Agency Data Center (HHSDC) is currently undertaking the WDTIP Project, which is a significant system development and implementation effort that will enhance communication between the 58 California counties. This effort will significantly impact the way business is currently done in California's welfare departments.

Transformation efforts result in many questions and concerns from those employees and stakeholders directly or indirectly affected by the change imperatives. Employees and stakeholders alike are curious and often uncertain about the change they see going on around them. Therefore, a formal program is necessary to educate and communicate the imperative for change, the details regarding the system, the implementation efforts, and the resulting impact on individual roles, as well as how it will change the way they do business within the renewed organization.

In developing a formal communications program, the following should be understood to determine the specific task assignments and schedule for communications: the current and desired situation and environment, the stakeholders involved, information needs (message, frequency, messenger, etc.) and the most effective communications media. Therefore, this communication plan strives to identify the above to most appropriately address information needs. The plan then details a specific and realistic approach to delivering appropriate messages in a timely fashion to all stakeholders.

3.2 Document Objectives

The following are specific objectives of the **Updated Stakeholder Communication Plan** :

o   Inform Internal and External Stakeholders
   - Provide stakeholders with timely, factual and appropriate information about the system development and implementation process.
   - Formalize a process that will allow the WDTIP Team to provide information, strategy, status updates, milestones and appropriate changes as the Project evolves to those interested and affected by the implementation.
   - Communicate implementation schedules.
   - Provide a mechanism to document obstacles as well as achievements.

o   Enroll Stakeholders and Promote Change
   - Clearly communicate the benefits and challenges that the technical solution will present, the consequences of not succeeding in this effort, and the counties' and consortia's roles in making it successful.
   - Motivate employees by acknowledging the importance of their involvement in and contribution to a successful implementation.

- Continue to strengthen Project partnerships.
- Help manage resistance by helping individuals understand the rational and emotional personal impact of change.

o Prevent Un-channeled Communication and Curbing Rumors
- Manage stakeholder perceptions and expectations of the Project outcomes and requirements.
- Reduce fears, uncertainty and rumors.

o Obtain Feedback from Stakeholders
- Develop a mechanism through which the counties, the WDTIP Team and external stakeholders can provide feedback, communicate concerns and discuss issues relating to the system development and implementation.
- Provide a forum for and encourage two-way communication.
- Evaluate, direct and escalate issues to appropriate arenas for resolution.

o Generate Enthusiasm and Excitement
- Acknowledge/celebrate progress and the successes of the system development and implementation.

o Support the Change Leadership Process

3.3 Potential Barriers to Effective Communication

The following are potential barriers to the successful execution of the **Updated Stakeholder Communication Plan**:

o Inconsistent stakeholder communication methods (e.g., fax, e-mail, mail, etc.)
o Lack of demonstrated county support for the Project
o Insufficient Implementation Team staffing for the task
o Recent change in government administration and policy
o General resistance to change

3.4 Expected Benefits

The following are expected benefits of the **Updated Stakeholder Communication Plan**:

o Acceptance of change through open, honest education regarding the status of system development and implementation
o Communications that respond directly to stakeholder information needs and communicate roles and responsibilities
o Development of a vehicle to identify and track resolution of issues related to any part of the Project
o Celebration of the successes as well as an enhanced understanding of the challenges and the opportunities
o Increased effectiveness of the implementation and conversion activities as well as the change leadership efforts

o   Increased internal team building and team effectiveness

3.5 Critical Success Factors

The following factors are critical to the success of the **Updated Stakeholder Communication Plan**:

3.5.1 Awareness
Communication about the Project must occur. If stakeholders are not informed of the WDTIP Project's imperatives, objectives, outcomes and the associated impacts, they will not be prepared for the changes; nor will they understand, internalize or support the changes around them.

3.5.2 Content
Communication must be relevant, meaningful, and at an appropriate level of detail for the targeted audience. The message should convey realistic expectations by dealing openly with the impact of change. Communication strategies should also be based on stakeholders needs and feedback.

3.5.3 Timeliness
Information must be shared in a timely manner to allow stakeholders opportunities to digest messages and react. For example, roles and responsibilities for data conversion must be communicated prior to county data conversion visits to best expedite the process.

3.5.4 Context
All communications should demonstrate and reinforce management support and commitment to the WDTIP business imperative by clearly indicating that the Project Sponsors and Management are the sources of information.

3.5.5 Format and Media
All communications must be developed and delivered in a format that is efficient, understandable and easily accessible. As much as possible, existing communication vehicles should be used.

3.5.6 Communication Flow
The Implementation Team will be responsible for reviewing communications to ensure WDTIP correspondence conforms to State and WDTIP format guidelines. In addition, the review will verify continuity, wherever possible, of the Project's message to stakeholders and external agencies. This will ensure the message conveyed to the Project's interested parties is consistent with WDTIP goals and objectives.

3.5.7 Effectiveness
To ensure effective communications, regular assessments of the communication plan and process must be conducted. An Access database, the Project Tracking System (PTS), has been developed by the Project to track issues and record resolutions that will be

categorized by sub-team. The Implementation Team intends to use the database to ensure effective follow up on communication issues.

3.6 Assumptions

The successful execution of the **Updated Stakeholder Communication Plan** is dependent upon the following assumptions:

o Cooperative participation of Project Sponsors and Management in ongoing communications throughout the duration of the Project
o Active participation and cooperation from key resources including HHSDC, the Department of Information Technology (DOIT), the California Department of Health Services (CDHS), CDSS, Welfare Consortia, and county welfare departments
o Adequate administrative support for the development, production and distribution of communications
o The receipt of regular feedback regarding the approach, development and delivery of all messages

4. Stakeholders

Identifying, classifying and understanding the various stakeholders, their specific information needs, and their ability to influence and affect outcomes, is a first critical step in developing and delivering effective messages.

Numerous WDTIP stakeholders have been identified. Some of these groups will only need to be periodically kept abreast of key milestones, findings and decisions that may indirectly affect their jobs within the organization. However, other groups will require very detailed and frequent communications as their roles may be directly affected by process changes. The following list includes the key stakeholder groups or audiences that have been identified for WDTIP. Descriptions of these groups are included in the subsections that follow.

- CDSS
- County Welfare Departments
- County Welfare Directors Association (CWDA)
- CDHS
- Federal Agencies
- Other Welfare Automation Projects
- Project Management
- SAWS Consortia
- State Control Agencies
- Vendors
- WDTIP Status Update Group
- WDTIP Implementation Team
- WDTIP Teams and Sub-Teams

WDTIP Access databases were developed for nine of these stakeholder groups to maintain contact lists. Each database contains the stakeholder name, title, e-mail address, phone number, fax number and mailing address. Following is a list of the databases:

- CDSS Contacts
- CWDA 2000 Directory
- Consortia Liaisons
- ISAWS System Support
- Liaisons
- SAWS Consortia Managers
- WDTIP County Contact Designees

❑   WDTIP Status Meeting Attendees

❑   There are several uses for the databases. Some examples include, sending messages from the Statewide Automated Welfare System (SAWS) Project Manager or broadcast communications from the WDTIP Help Desk; distributing the monthly WDTIP Help Desk Bulletin and the quarterly WDTIP information letter; notifying members of meetings or distributing meeting minutes. The databases are updated as needed and are posted on the shared drive of the WDTIP network.

4.1 California Department of Social Services

CDSS is the Project Sponsor. CDSS is one of two principal agencies administering welfare programs at the State level (the other is CDHS). CDSS is responsible for all program policy interpretations with the exception of Medi-Cal. CDSS and CDHS will both work closely with WDTIP, to ensure a correct understanding of program rules and regulations, and to provide information technology services. It will be important, therefore, to conduct regular meetings with the policy branches of these agencies so that the WDTIP Team is aware of all policy changes that may impact the scope of the WDTIP system development. It will also be important to share the status of system development and implementation with these agencies.

4.2 County Welfare Departments

Although all county welfare departments are aligned with one of the consortia, counties also communicate independently with State agencies or other entities. The WDTIP implementation will directly impact each of the 58 county welfare departments. With the assistance of the WDTIP Team, counties will need to plan and execute data mapping and extraction activities, plan and execute daily updates, train eligibility staff and provide change leadership support. The successful execution of these activities will rely in large part on the Project's effective communication with each county.

4.3 County Welfare Directors Association

CWDA is a group of County Welfare Directors and their designees that meet regularly to discuss program, policy and welfare automation, among other topics. The CWDA is also a lobbying group. CWDA members are primary WDTIP stakeholders because they are the individuals that generate buy-in for the Project both at the State and the county levels. County welfare directors' support for WDTIP is absolutely vital because it promotes collaboration between the State and counties to successfully accomplish development, conversion and system implementation.

4.4 California Department of Health Services

CDHS is responsible for the Medi-Cal program, including benefits disbursement. CDHS also manages the only statewide system available to county workers, MEDS, and has oversight of SCI, which is integrated with SIS. CDSS and CDHS will both work closely with WDTIP, to ensure a correct understanding of program rules and regulations, and to

provide information technology services. It will be important, therefore, to conduct regular meetings with the policy branches of these agencies so that the WDTIP Team is aware of all policy changes that may impact the scope of the WDTIP system development. It will also be important to share the status of system development and implementation with these agencies.

4.5 Federal Agencies

Contact with Federal agencies is typically infrequent at the Project level. However, WDTIP expects to interact with two federal agencies: the United States Department of Agriculture (USDA)—Food and Nutrition Service (FNS) and the Health Care Financing Administration (HCFA). Currently, FNS participates in quarterly management meetings and attends the monthly SAWS Consortia Implementation Strategy meeting. FNS and HCFA also review the monthly DOIT status reports.

4.6 Other Welfare Automation Projects

Welfare-related automation projects include:
o   Statewide Fingerprint and Imaging System (SFIS)
o   Electronic Benefit Transfer (EBT)
o   Child Welfare Services Case Management System (CWS/CMS)
o   California Child Support Automation Project (CCSA)

Because changes in each project's status may impact future system interface requirements, WDTIP must keep these projects abreast of the status and discuss issues that impact all projects.

4.7 Project Management

Project Management includes all State and contractor staff at the team lead level and above. Project Management will be responsible for communicating messages in a timely fashion to stakeholder groups as well as other teams regarding their respective responsibilities. Additionally, Project Management will conduct regular management meetings and regular "All Hands" meetings to ensure that the Project is on track. Project Management will also be responsible for producing the monthly status reports.

The WDTIP Implementation Team will work closely with Project Management to ensure the appropriate messages are disseminated in a timely fashion.

4.8 SAWS Consortia

Chapter 303 of the California Budget Act of 1995, signed August 3, 1995, provided for a multiple county consortium strategy as a foundation for SAWS. Up to four consortia systems were allowed:

❑   Interim Statewide Automated System (ISAWS) - 35 small-to-medium counties

❑   Los Angeles Eligibility, Automated Determination, Evaluation and Reporting System (LEADER) - Los Angeles County

❑ Welfare Case Data System (WCDS) - also known as CalWORKs Information Network (CALWIN) is composed of 18 counties

❑ Consortium IV (C-IV) - the remaining four counties

These consortia are at various stages in the development or implementation of their SAWS systems. ISAWS is in the maintenance and operations phase; LEADER is in the pilot phase; WCDS, also known as CALWIN, is in the late planning stage; and the C-IV Consortium is in the early planning stage.

Consortia managers and liaisons must be kept abreast of the status of the Project and the responsibilities of the Consortia in order to coordinate and align multiple implementation schedules. Generally, consortia representatives will be included in all county communications.

4.9 State Control Agencies

The primary control agencies for WDTIP are DOIT, the Department of Finance (DOF) and the Department of General Services (DGS). These agencies monitor and review the direction and progress of WDTIP, and ensure appropriate funding for development and implementation activities. It is important, therefore, that key players from these agencies be kept abreast of the status of the Project, and any issues that may impact timely and efficient implementation.

4.10 Vendors

Counties have developed several welfare and welfare-related systems designed to capture information specific to their agencies. The usefulness of the WDTIP system to counties depends upon its ability to capture current and historical welfare-related data elements from these systems. GAIN Employment Management System (GEMS), GAIN Employment Activity and Reporting System (GEARS) and GAIN Information System (GIS) are some of the systems currently used in county welfare departments to capture employment services-related information. Data elements required for conversion reside in multiple welfare and welfare-related systems maintained by various vendors and there are individual system vendors responsible for the design and maintenance of these systems. These vendors are considered key to the Project's conversion approach because they may have a role in developing county conversion programs.

4.11 WDTIP Status Update Group

With the significantly diverse stakeholder interests, it is essential Project deliverables meet targets, Project scope is not allowed to become unwieldy and communication protocol is followed. This committee provides the management structure to appraise the general health, efficacy and course of the Project. The Status Update Group will be responsible for key Project decisions including scope control, development schedules, stakeholder issues, budgeting issues, Independent Verification and Validation (IV&V) evaluations and risk assessment reviews.

4.12 WDTIP Implementation Team

The WDTIP Implementation Team will be responsible for communication planning and execution. This Team will coordinate all communications from the individual teams; will ensure messages are approved and disseminated in a timely fashion; will solicit feedback from stakeholders regarding the content and process of communications; will continually revise the process to ensure that communications are as effective and efficient as possible; and will revise the **Updated Stakeholder Communication Plan**, as appropriate.

4.13 WDTIP Team and Sub-teams

The WDTIP Team includes all staff members (including Project Management) working on the Project. Most of the WDTIP Team will work within one of two sub-teams: the Application Team and the Implementation Team.

5. Message Types

Message types are the types of communications that have been identified as necessary for the successful development and implementation of the technical solution.

The message types that have been identified to date include:

Message Type	Description
County-Specific Issues	The Implementation Team will communicate to counties specifically for the resolution of county-specific issues. These issues will include application, Help Desk, data conversion, change leadership and ad-hoc training issues, as well as Project status and scheduling as it relates to each specific county.
Frequently Asked Questions	The Implementation Team will publish and disseminate the answers to frequently asked questions to counties and other stakeholders, when appropriate.
Functional Documentation	The WDTIP Team will provide functional documentation to appropriate stakeholders, affected agencies and end users. The **Detailed Design Specifications**, **External Developer's Guide, Implementation Plan** and **WDTIP System Training Curriculum** are examples of the documentation planned for publication to Project stakeholders and end users. These documents will be completed by dates specified in the Statement of Work and will then be updated as necessary.
General Project Information	The Implementation Team will make general Project information readily available to all stakeholders. General information includes Project scope and charter, list of Project partners and deliverables, as well as Project organization chart and interesting facts about the Project.
General Updates	General updates regarding Project status, policy and other direction changes, etc. will be published and disseminated to stakeholders as necessary.
Information Solicitation	Surveys, questionnaires, interviews and workgroups will be used when necessary to solicit information from WDTIP stakeholders.

Message Type	Description
Project and Project-Related Dates	Dates important to the Project will be included on the WDTIP Calendar of Events for Project Team members and on the WDTIP website for stakeholders. Some of these dates include Project milestones, deliverable due dates, on-going as well as pre-planned meetings, training dates, etc.
Project Issues	The WDTIP Team will address Project issues as they surface through the formal issue resolution process (see the **Project Management Plan**). These issues could include anything from overall Project direction to specific system issues. The issues and resolutions will be communicated to appropriate stakeholders.
Project Status	WDTIP Project Management will complete monthly status reports. The Implementation Team will publicize Project status on an on-going basis and as appropriate.
Roles and Responsibilities	The WDTIP Team will send out roles and responsibilities information to counties and other stakeholders when the cooperation of these entities is necessary for a specific activity (e.g., conversion, training, etc.).
Schedules	The Implementation Team will inform all stakeholders of the specific schedules appropriate to them. These schedules include data conversion, roll-out, etc.

6. Communications Media

The communications media is the means or channels for delivering messages to the targeted audience. Not all channels or methods are appropriate for all audiences and depending on the length or format of the message, some channels are not effective or viable.

The commination methods identified as appropriate for WDTIP are included below:

Communication Media	Description
Calendar of Events	The Implementation Team will publish a WDTIP Calendar of Events with the high-level schedule of Project phases, team schedules, internal/external meetings and regular Project publications. The calendar lists meetings the Project Team regularly attends or hosts and also lists any important ad hoc meetings. The calendar is also used to advise stakeholders when the Project's regular communications are scheduled for publication (i.e., the monthly WDTIP Bulletin or quarterly information letter). The calendar is maintained in Microsoft Outlook and can be accessed by all members of the WDTIP Team.
County Visits	When necessary, the WDTIP Team will make visits to specific counties. Generally these visits will occur for the purposes of data conversion, to address county-specific issues and to assist with training.
Electronic Communication	Several WDTIP stakeholders have technology available that will allow the Implementation Team to share information electronically (e.g., e-mail, fax, voice mail, etc.). Electronic communication media available to each of the counties will be published on the agency contact list and the Director database and will be used as often as possible.
Hard Copy Documentation	All deliverables as well as informational guides will be provided to the appropriate parties in hard copy.
Help Desk	The primary objective of the WDTIP Help Desk is to provide support to counties during implementation and use of the WDTIP system. The WDTIP Help Desk will serve as the central point for questions surrounding the application, screens, reports and connectivity. The WDTIP Help Desk will assess problems and determine the appropriate level of support required to resolve issues. Counties can call the WDTIP Help Desk Monday through Friday from 8:00 AM to 5:00 PM.

Communication Media	Description
Help Desk Bulletins	WDTIP Help Desk Bulletins will be published and disseminated monthly to specific Project stakeholders and end users to advise of system connectivity, functionality, design changes and projected enhancements. The Bulletin will contain a schedule of pertinent Project meetings, answers to frequently asked questions by other welfare professionals and some general Project updates.
Information Letters	The Implementation Team will publish a WDTIP Information Letter quarterly to share Project information with all stakeholders. The Information Letter will contain information regarding the Project, including: • What's new at WDTIP? • How will the system impact how I do my job? • When will WDTIP representatives be in my county? • Training tip of the day • Answers to Frequently-Asked-Questions • WDTIP puzzles • Contact information
Interviews	The WDTIP Team will conduct interviews with subject matter, technical and functional experts and others as needed for information gathering and validation.
Meetings	Meetings are an important vehicle for the WDTIP Team to communicate with external stakeholders and internal team members. The WDTIP Team will host a number of internal and external meetings. In addition, Project representatives attend meetings hosted by other entities. A list of internal and external meetings (as well as work group sessions – described in more detail below) that have been identified and their descriptions have been included as **Attachment A**. If participation by a WDTIP representative is intended, the meeting was also included in the Calendar of Events . In addition, the table in **Section 8, Media Matrix** provides more detail regarding how these meetings will serve as vehicles to present timely information about the status of the Project, and to share information as appropriate with internal and external stakeholders.
Monthly Status Reports	Project status reports will be issued monthly to the Status Update Group members. Contents of the Project status report include significant accomplishments, issues raised, issues resolved and significant accomplishments anticipated for the next report.

Communication Media	Description
Presentations	The Implementation Team, as well as other WDTIP Team members, will take as many opportunities as appropriate to make formal and informal presentations at external and regional meetings. This communication plan identifies several external meetings where providing Project status and other important Project information would be appropriate.
Regional Meetings	Regional meetings will be held with county representatives, Project analysts and programmers to discuss: Project approach and status, county/consortia roles and responsibilities, roll-out schedule and Project plan, training approach, change leadership activities, and conversion requirements. These forums will also provide a media for counties to raise issues and concerns.
Software	Project stakeholders use a variety of software and software versions. WDTIP will include, in all Project resource databases, any software and the versions used by Project stakeholders for communication. These databases will be updated when necessary and the information provided to the WDTIP Team and posted to the Project's shared drive.
Surveys/ Questionnaires	Surveys and questionnaires will be used by the WDTIP Team to solicit information from stakeholders regarding specific functional areas of the Project (e.g., conversion, training, etc.).
Traditional Communication	Traditional forms of communication (e.g., U.S. mail, memorandums, signs, brown bag lunches, etc.) are a low-tech approach to delivering WDTIP information and will be used whenever necessary.
Website	Publications on the WDTIP website are intended to share Project information with the public. Pages on the site include the Project scope, charter and status with several Project deliverables. Deliverable posted on the website will be subject to the **Configuration Management Plan**; all other documents, pages and links must be approved by WDTIP Project Management. The website will be updated on a regular basis and updates will be made through the assigned State resource to ensure version control. The website is a practical approach to meeting customer service requirements, obtaining feedback from our end users, providing efficiency for the customer and using technology to improve communication. The website address is www.wdtip.cahwnet.gov.

Communication Media	Description
Work Group Sessions	The WDTIP Team will convene work group sessions that will include subject matter, functional and technical experts. These sessions will be conducted to jointly develop business requirements, detailed design of the system and to validate both.

7. Approval Process

Once the **Updated Stakeholder Communication Plan** has been formally approved, all communications will be developed in accordance with these guidelines. To ensure consistency and to ensure that different Project teams or members are not duplicating messages, all communications should be submitted to the Implementation Team. The Implementation Team will review messages and format and will then forward to Project Management for approval. WDTIP Project Management and the SAWS Deputy Director will be responsible for all communication approvals unless they determine that other individuals or agencies must be included in the approval process.

8. Media Matrix

The following chart describes the format, frequency, tone, level of detail, purpose, and target audience for each media that will be used regularly by WDTIP:

Communications Media	Frequency	Tone and Level of Detail	WDTIP Use for Media	Target Audience
County Visits	As needed	Formal presentations and data mapping session	Representatives of the WDTIP Team will visit counties to share important information about the status of the Project, roles and responsibilities, training issues, change leadership, etc. During these visits, the WDTIP Team will also assist the counties with data conversion activities, answer questions and address issues.	County representatives County data processing representatives
Electronic Communication	As needed	Formal and informal WDTIP communications	The WDTIP Team will use electronic communication (e.g., e-mail, voice mail, fax phone, etc.) as often as possible to communicate to stakeholders.	All stakeholders
Hard Copy Documentation	As needed	Formal and informal documents provided in hard copy	The WDTIP Team will provide certain information in hard copy format (e.g., memorandums, deliverables, Help Desk Bulletins, Information Letters, etc.).	Potentially all stakeholders (depends on the type)
Help Desk	Ongoing	Informal assistance on the system	The WDTIP Help Desk provides support to counties during implementation and ongoing use of the WDTIP system. The Help Desk can be accessed via phone and specifically provides system support, MEDS interaction and serves as the primary resource for updates and questions surrounding future Project phases.	All stakeholders
Help Desk Bulletins	Monthly and as needed	Formal information regarding system operations	The Help Desk Bulletins will provide counties with immediate information regarding the system. The Bulletin is used to inform counties of system down-time, maintenance procedures, etc.	Specific Project stakeholders and end users

Communications Media	Frequency	Tone and Level of Detail	WDTIP Use for Media	Target Audience
Information Letters	Quarterly	Letters that will include an assortment of informative and interesting write-ups on the Project	The WDTIP Information Letter will provide counties and other stakeholders with various types of Project information. These letters will be easy to read and include various types of information on the Project, including Project facts, answers to frequently-asked-questions, contact information, user tips, etc.	All stakeholders
Interviews	As needed	Informal interviews with WDTIP staff and stakeholders	The WDTIP Team will interview specific stakeholders to solicit information to most effectively conduct Project activities (e.g., implementation, conversion of data, training, etc.).	County data processing representatives Other county and consortia representatives
Meetings (External) Status Update Group Meeting	Monthly and as needed	Formal meeting	This forum will give the WDTIP Team the opportunity to provide Project updates, share information and assess Project status. This group will provide oversight and direction in regards to scope, schedule, stakeholder issues, budgeting issues, IV&V evaluations and risk assessment reviews.	Executive leadership from CDSS, DOIT, DOF, HHSDC, CWDA, CDHS, Deloitte Consulting, and IV&V
Meetings (External) California Association of County Data Processors (CACDP) Meeting	Monthly	Formal meeting to discuss county automation projects	This meeting will provide the WDTIP Team with a forum to communicate county programming requirements and Project schedule, as well as address specific technology issues.	County technical staff

Communications Media	Frequency	Tone and Level of Detail	WDTIP Use for Media	Target Audience
Meetings (External) California Automated Welfare System Status Update Group Meeting	Quarterly	Formal meeting to discuss the SAWS Project	This meeting will provide the WDTIP Team with a forum to communicate Project status, timelines and budgets; identify, communicate and resolve significant issues; and facilitate information exchange between the State, consortia and counties.	State executives
Meetings (External) California Medi-Cal Advisory Group (CMAG)—North and South Meeting	Monthly	Formal full-day meetings	This meeting will provide a forum to communicate status updates, system demonstrations, and make other presentations.	County representatives
Meetings (External) CWDA— Technical Review Team/County Advisory Team (TRT/CAT) Meeting	Monthly	Formal half-day meeting	This forum will provide the WDTIP Team with upcoming changes in policy that may affect the system development and provides a forum for WDTIP presentations and demonstrations. TRT is a CWDA committee that focuses on employment services and eligibility; CAT is a sub-group of TRT and focuses only on eligibility.	CDSS and county representatives from each region
Meetings (External) CWDA— TRT Meeting	Monthly	Formal half-day meeting	This forum provides WDTIP staff with upcoming changes in policy that may affect the system development and provides a forum for WDTIP presentations and demonstrations.	CDSS and county representatives from each region
Meetings (External) Consortia Meetings	Varies	Formal meetings held by each consortia that provides a forum to discuss issues that impact all counties in a consortium	These meetings provide an excellent forum in which to share specific information with counties about the status of the Project, schedule and county/consortia requirements. It also allows us to give demonstrations of the system and address specific questions and issues of the counties and consortia.	Consortia and county representatives

Communications Media	Frequency	Tone and Level of Detail	WDTIP Use for Media	Target Audience
Meetings (External) Consortia Strategy Implementation Committee Meeting	Monthly	Formal meeting to discuss the SAWS Project with consortia and State representatives	This meeting will provide a forum for the WDTIP Team to communicate Project status, receive information on other welfare-related projects, share lessons learned and identify and resolve issues. These meetings will also allow us to give demonstrations of the system.	Consortia and State representatives
Meetings (External) County Welfare Directors Information Technology (IT) Briefing Meeting	As needed	Formal full-day meeting	This meeting provides an excellent forum to share Project status, roles and responsibilities, expectations, and to provide system demonstrations to promote director buy-in.	County Welfare Directors and their representatives
Meetings (Internal) WDTIP "All Hands" Meeting	As needed	Informal internal meeting	WDTIP management will convene frequent "All Hands" meetings to inform staff of status, changes in Project direction, and upcoming events.	All WDTIP staff
Meetings (Internal) WDTIP Sub-Team Lead Meeting	Daily or as needed	Formal internal meeting	Chaired by Deloitte Consulting management, information will be shared at this meeting with team leads, which is to be shared in turn at the sub-team meetings.	WDTIP team leads and their representatives
Meetings (Internal) WDTIP Sub-Team Meeting	Weekly or as needed	Informal internal meeting	Team leads will have weekly meetings with their team members to discuss status and issues, and to share general information.	WDTIP sub-team members
Meetings (Regional)	One per region or as needed	Formal presentations at a regional level	Regional meetings will serve as a means to share information and address the concerns of the counties.	County and consortia representatives

Communications Media	Frequency	Tone and Level of Detail	WDTIP Use for Media	Target Audience
Memorandums	As needed	Formal memorandums	The WDTIP Team will communicate important Project information (e.g., status, requests for information, etc.) via memorandum from the WDTIP Project Sponsor or Project Management.	Status Update Group County Welfare Directors County and consortia representatives
Monthly Status Reports	Monthly	Formal Project reports that provide status and outstanding issues	The WDTIP Project Management will produce monthly status reports that will include accomplishments for the month and raise issues that may impact system development and implementation.	Status Update Group
Surveys (and Questionnaire s)	As needed	Formal surveys and questionnaires	The WDTIP Team will distribute surveys and questionnaires to solicit information to most effectively conduct Project activities (e.g., implementation, conversion of data, training, etc.).	County data processing representatives Other county and consortia representatives
Traditional Communication	As needed	"Low tech" methods of communication	The WDTIP Team will communicate via traditional communication methods (e.g., mail, brown bag lunches, meetings, etc.) wherever possible. For instance, when something must be formally disseminated, it will be distributed via mail or if communications must be made to a small group, the WDTIP Team may hold a brown bag lunch meeting.	Potentially all stakeholders and stakeholder sub-groups
Website	Updated monthly or as needed	Informational site that will be easy to follow/read	The website will provide general information about the Project, status updates, documentation, and points of contact.	All stakeholders

Communications Media	Frequency	Tone and Level of Detail	WDTIP Use for Media	Target Audience
Work Group Sessions – Joint Application Design (JAD)	As needed	Formal, two- to three-day work group session	The WDTIP Team will convene JAD sessions to assist with the development of the detailed design of the system and the validation of business requirements through design and code walkthroughs. These sessions will also provide a medium to share Project status with county, consortia and State agency representatives.	Select county, WDTIP Team and consortium representatives
Work Group Sessions – Joint Requirements Planning (JRP)	Monthly or as needed	Formal, one- to two-day work group session	The WDTIP Team will convene JRP sessions to create consensus regarding high-level system business requirements and the priority for implementation. These sessions will also provide a medium to share Project status with county, consortia and State agency representatives.	Select consortia, CDSS, county and WDTIP Team representatives

9. Communication Strategy Matrix

The following matrices describe WDTIP's strategy for developing and delivering communications that are targeted to the individual audiences, meet the communication objectives, convey the appropriate messages, and are delivered via the most effective and efficient methods.

To simplify, the key Project stakeholders are categorized into four audience groups as follows:

Audience #1: Senior Leadership	Audience #2: Project Team
CDSS—Project Sponsor County Welfare Directors (and CWDA) Status Update Group	WDTIP Team(s) WDTIP Team Leads
Audience #3: Directly Impacted Stakeholders	**Audience #4: Indirectly Impacted Stakeholders**
CDSS' and CDHS' Program Branches County Information Systems (Data Processing) Departments/Divisions County Welfare Departments (contacts and end users) Other Welfare-Related Automation Projects SAWS Consortia Vendors	DOF DOIT Federal Agencies

9.1 Matrix of Communication Strategies

The following matrices illustrate the various entities with which the Project communicates, and communication strategies specific to these entities. Specific communications that will be available or provided to all stakeholders are included below and have not been included on the matrix.

- ❑ Electronic Communication
- ❑ Hard Copy Documentation
- ❑ Information Letter
- ❑ Memorandums
- ❑ Traditional Communication
- ❑ Website

Audience #1: Senior Leadership

Audience	Objective	Media	Responsible Party	Timing
CDSS—Project Sponsor Status Update Group	Communicate Project progress Raise and resolve major issues to maintain Project timetable Secure buy-in Educate regarding new process	Status Update Group meetings Other welfare-related meetings Monthly status reports	SAWS Deputy Director WDTIP Project Management WDTIP Team Leads	Monthly and as needed
California Welfare Directors (and CWDA)	Communicate Project progress Secure buy-in Educate regarding new process Resolve issues	Status Update Group meetings Other welfare-related meetings	SAWS Deputy Director WDTIP Project Management WDTIP Team Leads	As needed

Audience #2: Project Team

Audience	Objective	Media	Responsible Party	Timing
WDTIP Team	Communicate Project progress and Project Management issues	"All Hands" meetings WDTIP sub-team meetings	WDTIP Project Management SAWS Deputy Director	Monthly or as needed
WDTIP Team Leads	Role (re)definition Task assignment Ensure timelines and goals are being met	WDTIP sub-team lead meetings	WDTIP Project Management	Daily or as needed

Audience #2: Project Team				
Audience	**Objective**	**Media**	**Responsible Party**	**Timing**
WDTIP Teams	Teambuilding	Progress celebrations Gifts Spontaneous outings Theme tokens	WDTIP Project Management WDTIP Team Leads	Ongoing
WDTIP Sub-Teams	Raise and resolve issues Seek advice	Weekly sub-team meetings Ad-hoc meetings	WDTIP Team Leads	Weekly and as needed

Audience #3: Directly Impacted Stakeholders				
Audience	**Objective**	**Media**	**Responsible Party**	**Timing**
CDSS' and CDHS' Program Branches	Communicate Project status Share policy changes	Regular meetings with CDSS and CDHS Other welfare-related meetings Monthly status reports	WDTIP Project Management WDTIP Team Leads	Ongoing
County Information Systems (Data Processing) Departments/Divisions	Communicate roles and responsibilities Provide technical information and guidance Solicit information needed to conduct specific Project activities (e.g., conversion, implementation, training, etc.)	Regional meetings County visits Other welfare-related meetings (CAT/TRT, IT briefing, CACDP, etc.) Help Desk / Bulletins Surveys & questionnaires Interviews	WDTIP Team Leads	Ongoing

Audience #3: Directly Impacted Stakeholders				
Audience	**Objective**	**Media**	**Responsible Party**	**Timing**
County Welfare Departments SAWS Consortia	Communicate Project progress and next steps Provide forum to raise and resolve issues Solicit information to conduct Project specific activities (e.g., conversion, implementation, training, etc.) Communicate roles and responsibilities Provide technical assistance Assess change readiness Conduct JRP/JAD sessions Coordinate conversion activities Provide training	Monthly status reports Regional meetings Memos from Project Sponsors Work group sessions Project information letter Help Desk / Bulletins CWDA meetings Other welfare-related meetings County visits Help Desk / Bulletins Surveys/questionnaires Interviews	SAWS Deputy Director WDTIP Project Management WDTIP Team Leads	Ongoing
Other Welfare-Related Automation Projects	Communicate Project status Discuss and resolve interface issues	Other welfare-related meetings Monthly status reports	WDTIP Project Management WDTIP Team Leads	As needed
Vendors	Discuss conversions strategy and activities (where appropriate)	Regional meetings County visits Ad-hoc meetings	WDTIP Team Leads	

Audience #4: Indirectly Impacted Stakeholders				
Audience	**Objective**	**Media**	**Responsible Party**	**Timing**
DOF DOIT	Communicate Project progress	Participation in agency meetings Information letters	SAWS Deputy Director WDTIP Project Management	As needed
Federal Agencies	Communicate Project information	Other welfare-related meetings	SAWS Deputy Director WDTIP Project Management WDTIP Team Leads	As needed

Attachment A - External and Internal Meeting and Work Group Descriptions

Meetings	Description
External Meetings	
Status Update Group Meetings	This committee will be composed of executive management stakeholders. This committee will meet monthly, or as needed, to receive Project status updates, share information and assess Project status. This group will also provide oversight and direction in regards to scope, schedule, stakeholder issues, budgeting issues, IV&V evaluations and risk assessment reviews.
California Association of County Data Processors (CACDP) Meetings	The CACDP is a group of county data processing directors and their designees that meet monthly to discuss county automation projects and other issues. This forum may also be used to communicate county programming requirements and Project schedule, as well as address specific technology issues.
California Automated Welfare Systems Advisory Committee (CAWSAC)	This is an executive level group that provides policy direction and advice to the SAWS Project. This group acts on recommendations for strategy changes and resolves significant policy issues. CAWSAC members help to ensure the success of the SAWS multiple county consortium strategy by facilitating exchange between the State, consortia and counties.
CDSS—Bay Area Regional Meetings	This group is convened by CDSS and is hosted by the Bay Area representative who attends the Technical Review Team/County Advisory Team (TRT/CAT) meetings. The purpose of these meetings is to disseminate information received from the most recent TRT/CAT meeting to the Bay Area counties.
California Medi-Cal Advisory Group (CMAG) Meetings—North and South	CMAG is convened by CDHS and is held in both the North and South. The meetings are held monthly and alternate between northern and southern locations. CDHS communicates MEDS changes and policy changes during these meetings. A WDTIP Representative will attend these meetings to provide status updates, system demonstrations, and other presentations.
Consortia Meetings	These are formal meetings that are held by each of the consortia and are used to discuss issues that impact all the counties in that consortium. These meetings will provide the WDTIP Team with a forum to communicate Project status, schedule and county/consortia requirements. This forum may also be used to give demonstrations and address county- and consortium-specific questions.
Consortia Strategy Implementation Committee Meetings	This group is cross-section of consortia and county representatives that meet monthly to report on progress, discuss issues, share lessons learned and discuss future plans. In addition, representatives of other welfare-related projects make presentations on the status of their projects. CDSS and CDHS staff regularly attend to share information such as program policy updates, program initiatives or other related subjects.

Meetings	Description
County Welfare Directors Association (CWDA)—CAT Meetings	The CWDA CAT is a sub-group of the TRT and focuses only on eligibility. This forum will provide WDTIP staff with upcoming changes in policy that may affect system development and will also provide a forum for WDTIP presentations and demonstrations.
County Welfare Directors Association—TRT Meetings	The CWDA TRT is a meeting of county (and sometimes State) representatives convened to discuss both employment services and eligibility policy issues. These meetings were initially convened to develop All County Letters and All County Information Notices necessary for county implementation of Welfare Reform prior to the publication of AB-1542. Like the CAT, this forum will provide WDTIP staff with upcoming changes in policy that may affect system development and will also provide a forum for WDTIP presentations and demonstrations.
County Welfare Directors' IT Briefing Meetings	These meetings occur only as needed. The purpose of this meeting is to provide a status of all welfare-related automation projects, and to discuss the concerns of the welfare directors. This meeting will provide an excellent forum to share Project status, roles and responsibilities, expectations and to provide system demonstrations to promote director buy-in.
Internal Meetings	
WDTIP "All Hands" Meetings	WDTIP will utilize frequent "All Hands" meetings to share information with all the Project staff. These meetings can be used to inform staff of status, changes in Project direction, and upcoming events. These will be held at monthly, or more frequently, if necessary.
WDTIP Team Lead Meetings	Project Management will hold team lead meetings daily to report on status, resolve issues, discuss schedule or other changes, etc. Team leads are expected to share information from these meetings with their respective staff at team meetings (see below).
WDTIP Team Meetings	Team leads will hold frequent (at least weekly) meetings to report on team status, resolve issues, discuss schedule or other changes, discuss information shared at WDTIP team meetings, etc.
Working Groups	
Joint Application Design (JAD) Sessions	The WDTIP Team will conduct JAD sessions with subject matter, functional and technical experts to gather and solicit information surrounding design of the system. Using the high-level business requirements (see JRP sessions, below), these sessions will be conducted to jointly develop the detailed design of the system. In addition, this group will be responsible for validating implementation of business requirements through design and code walkthroughs.

Meetings	Description
Joint Requirements Planning (JRP) Sessions	The WDTIP Team will conduct JRP sessions with subject matter, functional and technical experts to gather and solicit information surrounding business requirements. These sessions are conducted with the intention of obtaining consensus of the *high-level* business requirements and the priority of implementation. These sessions will also provide a medium to share the Project status with the counties, Consortia and State agency representatives.